# North Carolina COVID-19 Vaccine Management System (CVMS)

**Provider Enrollment Portal** 

**Vaccine Coordinator User Guide** 

Version 5

March 9, 2021







If you have any questions, issues or requests, please go to the

CVMS Help Desk Portal\* at https://ncgov.servicenowservices.com/csm\_vaccine

If you are in North Carolina, you can also call the COVID-19 Provider Help Center

at (877) 873-6247 and select option 8. The COVID-19 Provider Help Center

is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

- 1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
- 2. Populate your first name, last name, business e-mail, and your registration code NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)
  For providers who are not appointed or may not have a Provider PIN you may use the following generic Provider PIN to register.
  - For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021
- 3. You will receive an e-mail with your username and temporary password to log into the portal



<sup>\*</sup> On the home page of the CVMS Help Desk Portal, select the "Vaccine Provider" option to submit your question, issue, or request.

### **Table of Contents**

	Pages
Provider Enrollment Process Overview	5-8
Completing Section B	9 – 23
Practicing Provider Bulk Upload	24 – 28
Steps After Completing Section B	29 – 30
Resubmitting Section B	31 – 33
Appendix	34 – 36



### **Overview**

#### Section B

Welcome to the Locations page of the NCDHHS Provider Enrollment Portal of the COVID-19 Vaccine Management System (CVMS). Please read the following instructions before enrolling your COVID-19 vaccination location.

As a Vaccine Coordinator, you are about to complete Section B (Provider Profile) of the CDC COVID-19 Vaccination Program Provider Agreement. This section gathers specific information on your location. If you serve as Vaccine Coordinator for multiple locations within your organization, **you must complete this section for each respective location**. To complete this section, you will be asked for:

- Location details
- Primary and Back-up Vaccine Coordinator contact information
- Shipment availability
- Provider type and setting
- Population(s) served
- Storage capacity and storage unit specifications (including brand, model, type, and interior and exterior pictures)
- List of providers, including license numbers, with prescriptive authority

If you also serve as CEO and/or CMO for your organization, click on the "CEO Review/Sign" and/or "CMO Review/Sign" at the top menu bar after you have completed Section B to review the conditions for enrollment and provide your signature.

Don't Show this Again

Close

In this user guide, we will discuss how the Vaccine Coordinator will be able to complete Section B of the Provider Enrollment process in the CVMS Provider Enrollment Portal.

The content included in this training is for the following role: **Primary Vaccine Coordinator.** 

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Edge Chromium, or Safari browsers
- Log into the CVMS Provider Enrollment Portal at <u>https://covid-enroll.ncdhhs.gov/</u>

Now, let's get started!

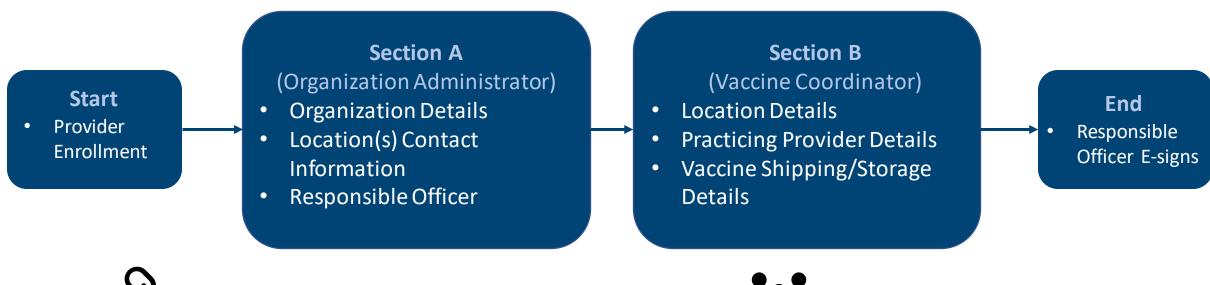


## **Provider Enrollment Process Overview**



### **CVMS Provider Enrollment Process Overview**

The COVID-19 Vaccination Program Provider Enrollment Process takes place in the **CVMS PROVIDER ENROLLMENT PORTAL**. The CVMS Provider Enrollment Portal is a cloud-based solution.



- Additional Resources

  Provider Enrollment Portal https://covid-enroll.ncdhhs.gov/
- Provider Enrollment Checklist <u>COVID-19 Vaccine Management</u> System (CVMS) | NC DHHS COVID-19



**Relevant Roles** 

- Organization Administrator
- Vaccine Coordinator
- Responsible Officer (CEO and CMO)

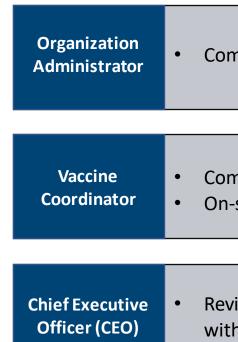


### **Provider Enrollment Roles**

### A provider is anyone who provides and administers healthcare services.



- Pharmacies
- Community health centers
- Hospitals
- Clinics
- Long-term care facilities
- Acute care hospitals
- Urgent care clinics
- Other medical care facilities



• Completes Section A for the entire organization.

- Completes Section B for their assigned location(s)
- On-site at the location

Reviews and signs on behalf of all locations within the organization

Chief Medical Officer (CMO)

Reviews and signs on behalf of all locations within the organization



### **Provider Enrollment Role Checklist**

### **COMPLETE THE CHECKLIST** below for **EACH ROLE** that you serve in your organization

### Organization Administrator

- **Register** for a Provider Enrollment account
- Mark if your organization is a Redistribution Participant
- Add all locations
- Add your organization's **CMO**
- ☐ Add your organization's **CEO**

### Vaccine Coordinator

- Register for a Provider Enrollment account via the link in the welcome email
- ☐ Upload pictures of the interior and exterior of your storage units
- ☐ Input all practicing providers at your location

### For locations with at least 25 practicing providers:

- □ Request & return the Practicing Provider Bulk Upload Template to the CVMS Help Desk Portal using <a href="https://ncgov.servicenowservice">https://ncgov.servicenowservice</a> s.com/csm vaccine (Ref. slide 2)
- ☐ Review and sign the CDC COVID-19 Vaccination Program Provider Agreement
- □ Review and sign the Storage and Handling Attestation

## Chief Executive Officer (CEO)

- ☐ Register for a Provider Enrollment account via the link in the welcome email
- ☐ Review and sign the CDCCOVID-19 VaccinationProgram Provider Agreement
- If applicable, review and sign the CDC Supplemental
   COVID-19 Vaccine
   Redistribution Agreement

## Chief Medical Officer (CMO)

- Register for a Provider
  Enrollment account via the link in the welcome email
- Review and sign the CDCCOVID-19 VaccinationProgram Provider Agreement
- If applicable, review and sign the CDC Supplemental
   COVID-19 Vaccine
   Redistribution Agreement



## **Completing Section B**



### Provider Enrollment Workflow – Section B



Primary Vaccine
Coordinator will
receive email
notifying they have
been added for a
location



Primary Vaccine
Coordinator will log
in and enter
information
regarding location
and contact info



Primary Vaccine
Coordinator will enter
details regarding
vaccine shipment
availability and
serviced population



Primary Vaccine Coordinator will provide information regarding storage units and providers



If a location has 25+ practicing providers, the Primary Vaccine Coordinator can coordinate with the CVMS Help Desk to bulk upload the practicing providers



Vaccine Coordinator



Review, finalize, and submit all information

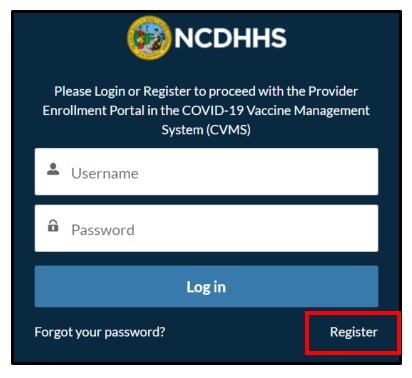
You will receive an email when you have been added as Vaccine Coordinator. If you don't receive an email, please submit a ticket to the CVMS Help Desk Portal at

https://ncgov.servicenowservices.com/csm\_vaccine.



6

### **Step 1 of 12: Log into the CVMS Provider Enrollment Portal**



When you are ready to begin the CVMS Provider Enrollment process, navigate to the CVMS Provider Enrollment Portal at <a href="https://covid-enroll.ncdhhs.gov/">https://covid-enroll.ncdhhs.gov/</a>.

- 1. Click **REGISTER**
- 2. Enter your NAME AND EMAIL
- 3. Create your PASSWORD
- 4. Click SIGN UP
- 5. You will be directed to **COMPLETE SECTION B**

### **Audience**

Vaccine Coordinator

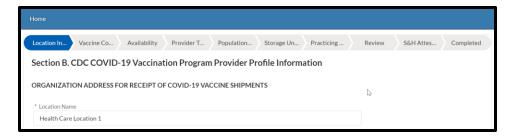
#### Tips

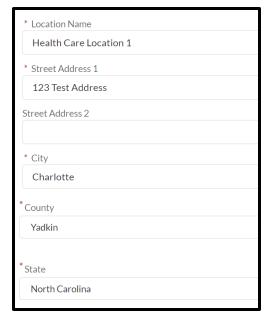
Link to the portal included in the email inviting you to register.

Reference the CVMS Provider
Enrollment Account
Registration and Password
Reset Training Guide for more
information about account
creation, which is available on
the NC Immunization Branch
website: CVMS User Guides,
Recorded Trainings and
Upcoming Trainings | NC
DHHS COVID-19



### **Step 2 of 12: Provider Location Information**







You will be directed to complete the **LOCATION INFORMATION** page. On this page, you will be able to provide additional details for your location.

- Enter the address where your location will receive
   COVID-19 vaccine shipments
- 2. Please indicate if the address for vaccine shipments differs from the vaccine administration locations
- 3. Please indicate if another organization will order COVID-19 vaccine for this location
- 4. Click **NEXT** once all information is complete

### **Audience**

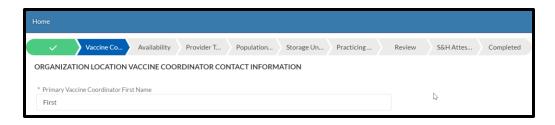
Vaccine Coordinator

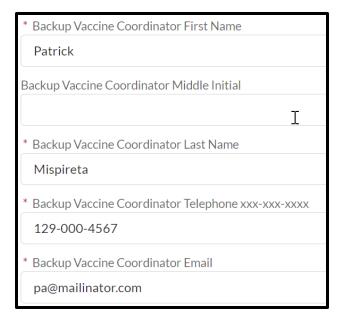
#### Tips

The Location Name field will be populated from details entered in Section A.



### **Step 3 of 12: Provide Vaccine Coordinator Details**







After providing the location details, you will be prompted to enter additional Vaccine

Coordinator Details. As the PRIMARY VACCINE

COORDINATOR, your information will be PREPOPULATED for you.

You will be asked to provide **BACKUP VACCINE COORDINATOR** contact details. The Backup

Vaccine Coordinator is typically the **LEAD PHYSICIAN** signing the agreement on behalf of your organization.

- 1. Enter the **BACKUP VACCINE COORDINATOR DETAILS**
- 2. Click **NEXT**

#### **Audience**

Vaccine Coordinator

#### **Tips**

The Backup Vaccine Coordinator can be any representative from your location.

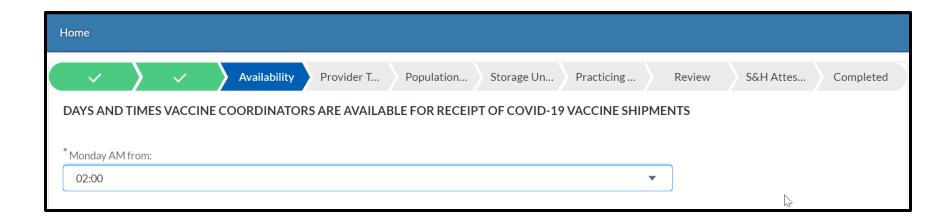
The Backup Vaccine Coordinator will <u>not</u> have access to the CVMS Provider Enrollment Portal.



### **Step 4 of 12: Enter Availability to Receive COVID-19 Vaccine Shipments**

You will be asked to provide your **AVAILABILITY TO RECEIVE COVID-19 VACCINE SHIPMENTS.** You have the option specify when you can receive shipments during a **MORNING AND EVENING TIMESLOT FOR EACH DAY** of the traditional work week.

- 1. Provide the **AVAILABILITY TO RECEIVE** COVID-19 vaccine shipments
- 2. If you are **NOT AVAILABLE TO RECEIVE** shipments during a timeslot, select **NA** for both the **FROM AND TO FIELDS**
- 3. Click **NEXT**

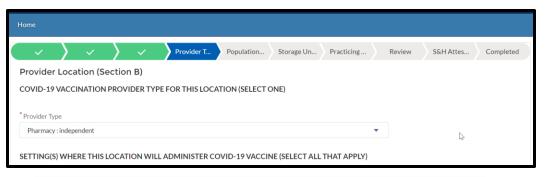




Vaccine Coordinator



### **Step 5 of 12: Enter Provider Type & Key Vaccination Details**







Next, you will be directed to the **PROVIDER TYPE/SETTINGS** page. In this section, you will provide more information about your provider type and other key details.

- 1. Select a **PROVIDER TYPE**
- Select ALL THE SETTINGS that apply
- 3. Enter the **ANNUAL NUMBER OF PATIENTS**served for **EACH AGE DEMOGRAPHIC**. If you do
  not know, select **Unknown**
- 4. Enter the **AVERAGE NUMBER OF PATIENTS** seen per week
- 5. Enter the **PEAK INFLUENZA VACCINES ADMINISTERED**
- 6. Click **NEXT**

#### **Audience**

Vaccine Coordinator

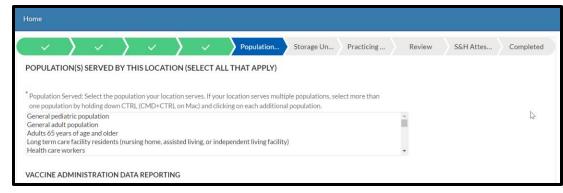
### Tips

To select more than one setting, click CTRL on your KEYBOARD and all values that apply.

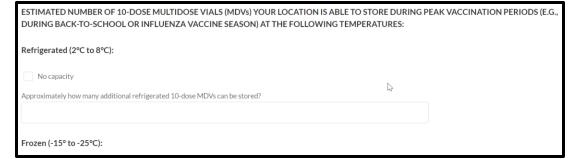
If you have Mac, CONTROL + COMMAND and select all values that apply.



### **Step 6 of 12: Enter Population Type / # of 10-Dose MDVs**



Next, you will be directed to the **POPULATION** TYPE / # OF 10-DOSE MDVS page. On this page, you will provide additional information about the **POPULATION(S) YOU SERVE** and some STORAGE DETAILS.





- Select **ALL THE POPULATIONS SERVED** by your locations
- Enter your location's **REPORTING STATUS** / IIS NUMBER.
- Enter your location's **STORAGE CAPACITY DETAILS**
- If your location does not have any storage capacity, select **NO CAPACITY**
- Click **NEXT**

#### **Audience**

Vaccine Coordinator

#### Tips

Pharmacies can call 1-877-873-6247 to determine their IIS number. All other types of providers can enter their NCIR number.

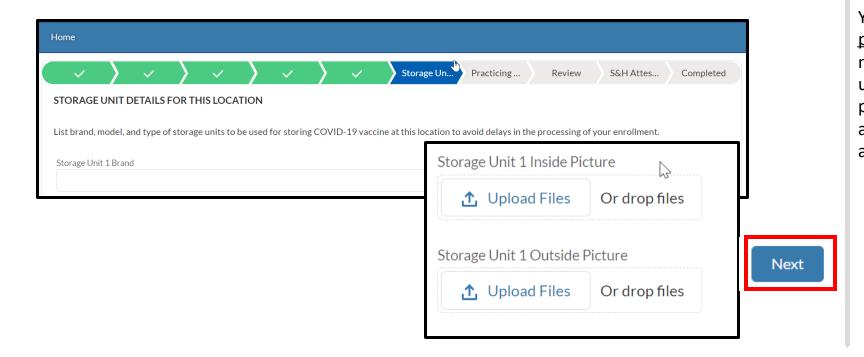


### **Step 7 of 12: Provide Additional Storage Unit Information**

Next, you will be asked for more information on your **LOCATION'S STORAGE UNITS**. You may enter up to a **MAXIMUM OF FIVE STORAGE UNITS**.

You MUST UPLOAD INSIDE AND OUTSIDE PHOTOS of your storage units.

- 1. Enter the **BRAND**, **MODEL**, **AND TYPE** for each storage unit
- 2. UPLOAD INSIDE AND OUTSIDE PHOTOS of each storage unit
- 3. Select **N/A** for any remaining storage unit fields you will not use
- 4. Click **NEXT**



#### Audience

Vaccine Coordinator

#### Tips

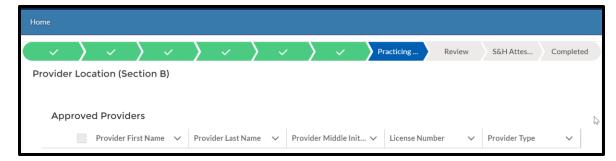
You must upload <u>actual</u> <u>pictures</u> of your storage units, not stock photos. Failure to upload actual photos will prevent your submitted application from being approved.

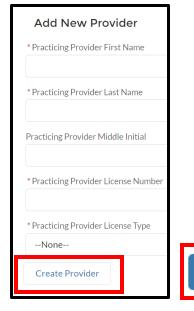


### **Step 8 of 12: Enter Your Practicing Providers Information**

Next, you will be asked to **ENTER ALL PRACTICING PROVIDERS** with <u>prescribing</u> authority (i.e., MD, DO, NP, PA, RPh) for the COVID-19 vaccine at your location.

- For each practicing provider, enter their information as it APPEARS ON THEIR MEDICAL LICENSE
- Click CREATE PROVIDER
- 3. The practicing provider will be added to the list





### **Audience**

Vaccine Coordinator

### Tips

The practicing provider's name entered must match exactly how the practicing provider's name appears on the practicing provider's medical license.

If you represent a location with **25 or more practicing providers**, please reference the next section in this user guide.

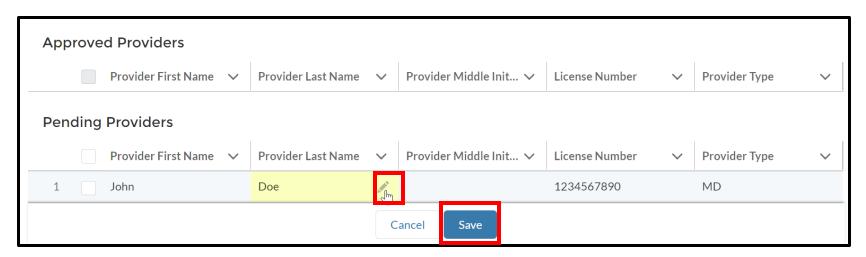


### **Step 9 of 12: Edit Your Practicing Providers Details**

Once you enter all your practicing providers, **REVIEW THE PROVIDER LIST**. You can update or deactivate practicing providers that you entered.

### To **UPDATE THE INFORMATION** for a practicing provider:

- 1. Locate the CORRECT PROVIDER
- 2. Click on the **PENCIL** next to the field you wish to update
- 3. Click outside of the field
- 4. Click SAVE





Vaccine Coordinator



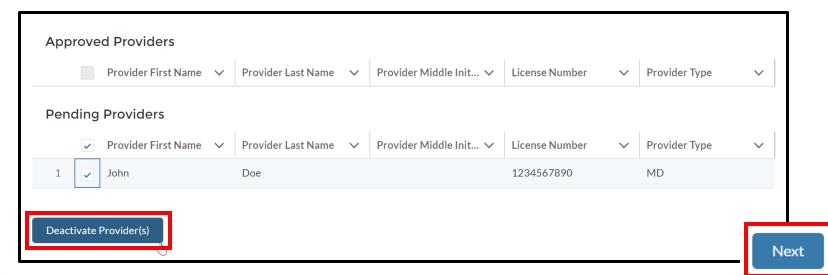
### **Step 10 of 12: Deactivate a Practicing Provider**

Before you move to the next section, you can also deactivate any practicing providers you added to your providers list. It is **IMPORTANT THAT YOU REVIEW ALL PROVIDER DETAILS** before navigating to the next section.

#### To **DEACTIVATE A PROVIDER**:

- 1. Select **ONE OR MORE PROVIDERS** you wish to deactivate
- 2. Click **DEACTIVATE PROVIDER(S)**

Once you confirm that all practicing provider details are correct, click **NEXT** 





#### **Audience**

Vaccine Coordinator

### Step 11 of 12: Review & Sign the CDC COVID-19 Vaccination Program Provider Agreement



After clicking next, you will be able to review the information you provided and SIGN THE CDC COVID-19 VACCINATION PROGRAM PROVIDER AGREEMENT.

#### Audience

Vaccine Coordinator



It is **IMPORTANT** that you confirm that everything you entered for **SECTION B IS ACCURATE AND COMPLETE.** 

#### Tips

If you wish to REDO YOUR SIGNATURE, click the CLEAR button.

- Review the information you entered in Section B
- 2. Use the **PREVIOUS** button to correct errors
- 3. DRAW YOUR SIGNATURE
- 4. Click **ADOPT AND USE**
- 5. Click **NEXT**





### **Step 12 of 12: Review & Sign the Storage and Handling Attestation**



\* Draw Your Signature Here

Adopt and Use
Clear



Next, you will **REVIEW AND SIGN** the **STORAGE AND HANDLING ATTESTATION**.

It is **IMPORTANT** to know that this **SIGNATURE IS CONSIDERED** on behalf of **YOU AND THE BACKUP VACCINE COORDINATOR.** 

- Read the STORAGE AND HANDLING ATTESTATION
- 2. DRAW YOUR SIGNATURE
- Click ADOPT AND USE
- 4. Click **NEXT**
- 5. Section B is now **COMPLETE**

#### **Audience**

Vaccine Coordinator



December 15, 2020

### **Email Notification After 7 Days of Inactivity**

If you have not updated Section B for your location after 7 calendar days while it is in the New status, you will receive an email notification reminding you to complete Section B. It is important to complete Section B as soon as possible for your location to be reviewed by the Immunization Branch Staff team.



#### **Audience**

Vaccine Coordinator



## **Practicing Provider Bulk Upload**



### **Practicing Provider Bulk Upload Overview**

For **LOCATIONS WITH 25 OR MORE PRACTICING PROVIDERS** who will be administering the COVID-19 vaccine, you can receive support in entering your practicing providers into CVMS via the **PRACTICING PROVIDER BULK UPLOAD PROCESS**. The Practicing Provider Bulk Upload process is offered to support completion of Section B.

If your location is eligible for this assistance, **PLEASE SUBMIT SECTION B WITHOUT ADDING YOUR PRACTICING PROVIDERS IN CVMS**. It is **IMPORTANT** to know that your **LOCATION CANNOT BE APPROVED**until your **PRACTICING PROVIDERS ARE ENTERED**.

<b>⊿</b> A	В	C	D	E	F	G
Dravidar Enrallment /Location	Practicing Provider	Practicing Provider	Practicing Provider Last	Practicing Provider	Practicing Provider	Comments
Provider Enrollment (Location)	First Name	Middle Initial	Name 🔻	License Type 🔻	License Number 🔻	Comments
2	Bertram	S	Roberson	MD	74824184	
3	Amy	I	Torres	MD	802582528	
4	Fathima	В	Calhoun	DO	8053985	
5	Jaye		Dunlap	DO	79840274	
6	Cherie	T	Perkins	NP	5270742	
7	Alessandra		Schmitt	NP	8792348124	
8	Jaheim	S	Leach	PA	84802242	
9	Kirstie	A	Bender	PA	85824381	
10	Adnan		Monroe	RPh	15424524	
11						

#### **Audience**

Vaccine Coordinator

#### Tips

If you choose to use the practicing provider bulk upload process, do not manually enter any providers into CVMS.



### **Step 1 of 3: Practicing Provider Bulk Upload Template**

To initiate the Practicing Provider Bulk Upload process, you must download the **PRACTICING PROVIDER BULK UPLOAD TEMPLATE**.

Please download this template for the Immunization Branch website:

CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19

The template name is **Practicing Provider Bulk Upload Template** (Excel)

	Α	В	С	D	Е	F	G
	Provider Enrollment (Location)	Practicing Provider	Comments				
1	Provider Enrollment (Location)	First Name	Middle Name	Last Name	License Type	License Number	Comments
2							
3							
4							
5							
6							
7				כ			
8				7			



#### **Audience**

Vaccine Coordinator

### **Step 2 of 3: Enter Practicing Provider Information**

Once you have the Practicing Provider Bulk Upload Template, enter details for each practicing provider who will administer the COVID-19 vaccine at this location. Remember, all **INFORMATION ENTERED MUST MATCH** what appears on the **PRACTICING PROVIDER'S MEDICAL LICENSE**.

**COMPLETE ONE** Practicing Provider Bulk Upload Template **PER LOCATION.** 

- 1. Enter the following information FOR EACH PRACTICING PROVIDER:
  - First Name
  - Middle Initial (if applicable)
  - Last Name
  - License Type (select option from dropdown)
  - License Number

#### **Audience**

Vaccine Coordinator

### Tips

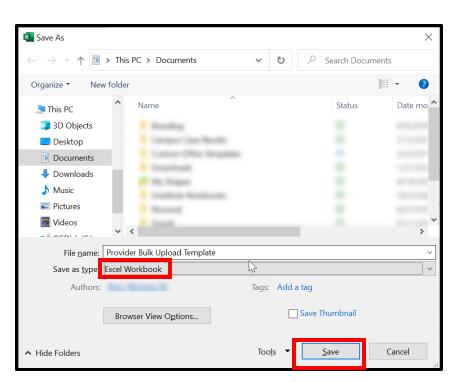
Complete one practicing provider bulk upload template per location.



### **Step 3 of 3: Save & Send Practicing Provider Bulk Upload File**

Review the Practicing Provider Bulk Upload file for completeness and accuracy. You can now **SAVE AND SEND THE FILE** to the CVMS Help Desk Portal for processing.

- 1. **REVIEW** all information
- 2. SAVE the file as an EXCEL FILE
- 3. SUBMIT THE FILE TO THE CVMS HELP DESK PORTAL at <a href="https://ncgov.servicenowservices.com/csm">https://ncgov.servicenowservices.com/csm</a> vaccine.
  - Please INCLUDE THE LOCATION NAME for the Practicing Provider Bulk Upload File within the ticket.



#### **Audience**

Vaccine Coordinator

#### Tips

Include the Location Name in the email with your completed Practicing Provider Bulk Upload file.



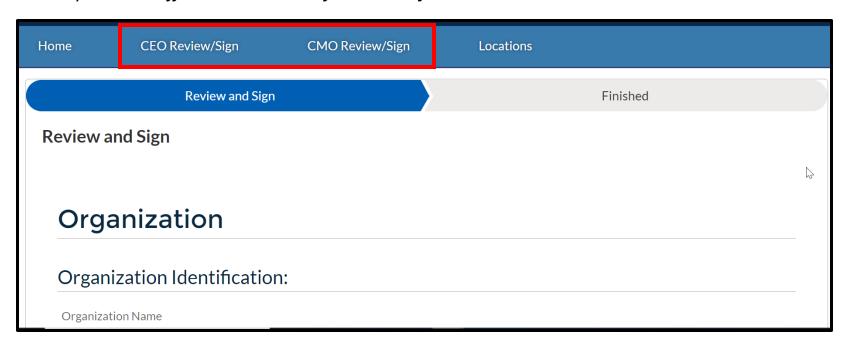
## Steps after Completing Section B



### **CMO & CEO Sign the CDC COVID-19 Vaccination Program Provider Agreement**

Once you complete Section B, your CMO AND CEO will be able to REVIEW AND SIGN the CDC COVID-19 VACCINATION PROGRAM PROVIDER AGREEMENT and the CDC SUPPLEMENTAL COVID-19 VACCINE REDISTRIBUTION AGREEMENT, if applicable.

If you are your organization's CMO and / or CEO, you can proceed to these steps. *Reference the CVMS Provider Enrollment Responsible Officers User Guide for more information.* 



#### **Audience**

Vaccine Coordinator

### Tips

Please review the CVMS
Provider Enrollment
Responsible Officers User
Guide for further instruction,
which is available on the NC
Immunization Branch website
at CVMS User Guides,
Recorded Trainings and
Upcoming Trainings | NC
DHHS COVID-19



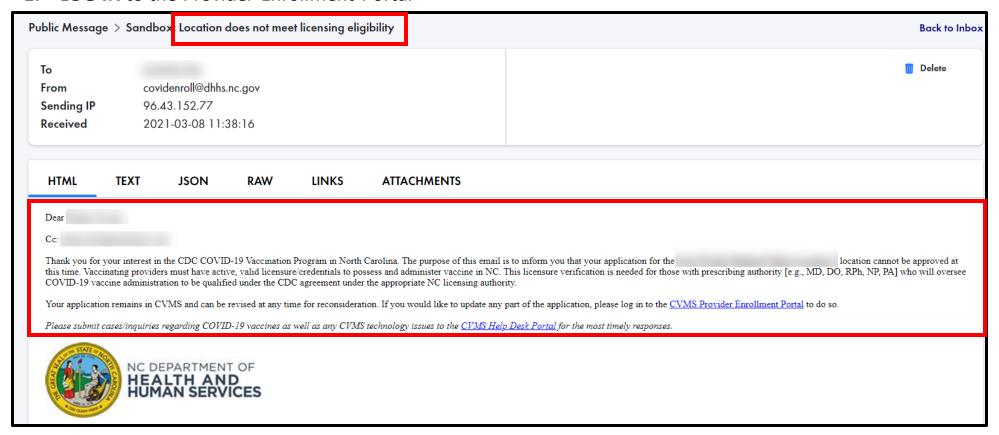
## **Resubmitting Section B**



### **Step 1 of 2: Receiving Rejection Email Notification**

After your location is reviewed, the Immunization Branch will either approve or reject your location. If your location is rejected, you will receive an email notification with the **REASON FOR REJECTION in the subject line** as well as the body of the message. You will be able to resubmit your Section B for your location.

#### 1. LOG IN to the Provider Enrollment Portal



#### **Audience**

Vaccine Coordinator

### Tips

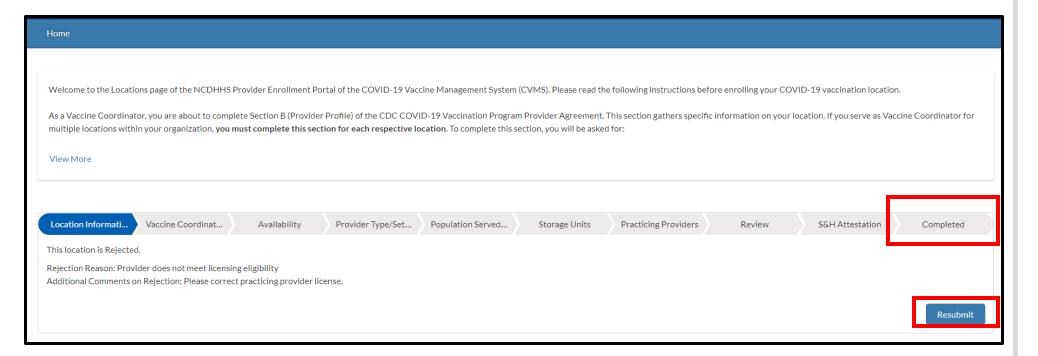
Your Organization Administrator will be copied on the email if your location is rejected.



### **Step 2 of 2: Resubmitting Section B**

You will be asked if you would like to resubmit your Section B. Please take the time to update your Section B as well as review all the information you are submitting one more time. Once you reach the final page of Section B, your Section B will be resubmitted for review.

- 1. Click RESUBMIT
- 2. After clicking Resubmit, use the **NEXT / PREVIOUS** buttons to review and update your Section B



#### **Audience**

Vaccine Coordinator



## Appendix



### **Additional Notes**

### **Key Items:**

- Hyperlinks appear as light blue and will provide additional information or navigation.
- \* Asterisks are used to denote required information.
- A Toggle can be clicked to see selectable options.
- A Pen can be clicked to make edits to the field.
- Previous Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.
- Pause Dause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/login.

#### **Contact Information:**

All questions should be directed to the CVMS Help Desk Portal at <a href="https://ncgov.servicenowservices.com/csm\_vaccine.">https://ncgov.servicenowservices.com/csm\_vaccine.</a>

### **Supported Web Browsers:**

- Please use the latest version of Chrome, Firefox, Edge Chromium, or Safari browsers to access CVMS.
- For more information on supported browsers, see <a href="https://help.salesforce.com/articleView?id=getstart\_browsers\_sfx.htm&type=5">https://help.salesforce.com/articleView?id=getstart\_browsers\_sfx.htm&type=5</a>
- Note: Internet Explorer and Edge (Non-Chromium) browsers are not supported.



### **User Guide Change Log**

### **Key Items:**

- Date of Change: Date that any updates were made to the User Guide
- Changes Made: Summary of the updates made within the User Guide
- Impacted Slides: Specific slides that were updated or changed
- Author: The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/14/2020	Original version		Kevin Kauffman
2	12/31/2020	Removed link to the Provider Enrollment portal	4, 6	Simon Couderc
3	1/7/2021	<ul> <li>Removed any mention of CVMS Help Desk emails. Added Service Now Portal information.</li> </ul>	1, 2, 8, 10, 25, 27, 31	Courtney Seward
4	3/3/2021	<ul> <li>Updated language to focus on providers with prescribing authority per CDC agreement.</li> <li>Updated CVMS Call Center information</li> </ul>	2, 18	Jerilyn MacLaren-Hall
5	3/9/2021	<ul> <li>Updated registration steps, automated 7-day reminder and added resubmit Section B steps.</li> </ul>	11, 30 - 32	Azalea Troche

